

THE ADVISOR

NEWSLETTER OF THE TEACHERS' RETIREMENT SYSTEM OF OKLAHOMA

SUMMER 2023

GIVING BACK

TRS PARTICIPATES IN THE STATE CHARITABLE CAMPAIGN (SCC) AND VOLUNTEERED AT THE REGIONAL FOOD BANK



Our staff recently celebrated exceeding our goal by raising more than \$9,600 for various charities across the State of Oklahoma! As a result, TRS SCC organizers Haley Drusen and Rod Boles, along with Executive Director Sarah Green and Manager Tammie Lambert-Miller were treated to an extra dessert.



Additionally, our staff and family members volunteered at the Regional Food Bank of Oklahoma to give back to our community. We had the opportunity to sort & pack 274 food boxes, 1,644 bags, and 3,973 meals totaling 4,768 pounds.



TRS recently donated to the City Rescue Mission this holiday season. Our TRS outreach organizers Frances Rogers, Lisa Miranda, Terri Giddens, Staci Aduddell and Tammie Lambert-Miller are pictured with our donation. We are so grateful to all those who helped bring items in support of our community!

Have questions regarding returning to work? TRS's retirement counselors can help you understand your options in working after retirement.

BOARD OF TRUSTEES

CHAIR

Brandon Meyer

VICE CHAIR

Kelsey Ardies

SECRETARY

Lisa Henderson

MEMBERS

Polly Christian
Vernon Florence
Shanci Garison
Brent Haken
Michael Kellogg
Chris Rector
Todd Russ
Stephen Streeter
John P. Suter
Marla Tharp
Ryan Walters

DESIGNEES

Jordan Harvey
Brandy Manek
Mathangi Shankar
Dr. Greg Winters

TRS WELCOMES NEW TRUSTEES



Born and raised in southern Illinois, Polly Christian majored in physical education at OU. She returned to Illinois after she received her degree and taught kindergarten for one year. Polly married her college sweetheart, Fred, and moved back to Oklahoma for good, spending her teaching career at Cleveland Elementary in Norman.

In retirement, Polly continues to be active in her community. Polly has also served in several leadership positions with the Oklahoma Retired Educators Association, including as the OREA State President, leading the organization through the hardships of the COVID-19 Pandemic. She continues serving in the role of immediate past president of the organization on the Board of Directors. Polly is also kept busy with her family, including three adult children--Michael, Laura, Scott, and seven grandchildren.



Todd Russ is the 20th State Treasurer of Oklahoma. Russ is a fourth-generation resident of Western Oklahoma. He earned a bachelor's degree in Finance from Southwestern Oklahoma State University. He is also a graduate of the University of Colorado Graduate School of Banking. He has specialized training in Asset/Liability Management and Interest Rate Risk Analysis. Todd Russ has more than 30 years of banking experience. He has been on the Board of

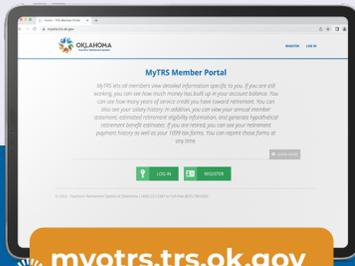
Directors of the Oklahoma Bankers Association and Chairman of the OBA Small Bank Council.

Russ also served six terms (2010-2022) representing District 55 in the Oklahoma House of Representatives. Todd and Khristy Russ live in Cordell. They have been married for 39 years and are members of New Beginnings Assembly of God, Cordell. They have three grown children and five grandchildren.



Ryan Walters currently serves as the State Superintendent of Public Instruction. Hailing from McAlester, Walters returned to his hometown after college and taught a variety of courses for nine years. In 2016, he was honored to be selected as an Oklahoma Teacher of the Year finalist.

In addition to serving on the Governor's Cabinet as Secretary of Education, he served on Governor Stitt's Education Committee and as the Executive Director of Oklahoma Achieves, an education initiative of the State Chamber of Oklahoma that sought to engage the business community more actively in education. Walters also worked as an education consultant on numerous topics. He and his wife, Katie, have four young children and reside in Oklahoma City.



MyTRS lets members view detailed information specific to them. Use **MyTRS** to view your account balance, see how many years of service credit you've accumulated, create retirement projections, and more. **Register for a MyTRS account today!**

How to Update Your Mailing Address

Active Members: contact your Employer to update your address.

Retired Members: Log into your MyTRS Portal to update or update form Update TRS Form 1R (Personal Data Form) located on our website at <https://oklahoma.gov/trs/forms.html>

Once complete, send the form via USPS to the following:
Teachers' Retirement System of Oklahoma
P.O. Box 53524 | Oklahoma City, OK 73152-3524

How to Update Your Email Address

1. Log onto the MyTRS Portal at <https://myotrs.trs.ok.gov>
2. Go to the Personal Information drop down screen
3. Click "edit" under the Email heading and make the change

Review Your Annual Member Statement

You should have recently received your 2022 Annual Member Statement via email or through physical mail (USPS). Your Annual Member Statement allows you to review the information your employer provides to TRS to ensure accuracy and gives you a clear picture of where you stand in the process of retirement. Your Statement includes the following information:

- Membership Date
- Member Contributions Balance
- Total Years of Service Credit
- Retirement Eligibility Rules (Rule of 80 or 90)

Tax Withholding Changes in MyTRS *Retirees Only*

Did you know that you can update your federal and state tax withholding through your MyTRS account?

Log in to your MyTRS account, go to "Retirements" and select "Tax Withholding Election", and update your taxes in a matter of minutes. Save time, save paper, and get back to enjoying your retirement!

DIRECTOR'S CORNER

SARAH GREEN, EXECUTIVE DIRECTOR

We feel the need, the need to modernize! Okay, okay. That adage doesn't quite fit, but "modernize" doesn't really fit into too many well-known exclamations either. Nevertheless, we are doing just that. Modernizing. Over the past year, TRS has worked with a consultant to review nearly every nook and cranny of our current pension administration system. Processes have been reviewed, staff interviewed, solutions demonstrated, and recommendations have been made with one goal in mind: improving our agency functions from top to bottom to provide a better overall experience for you, our members.

What will change? First and foremost, our processes will be streamlined for everything from retirements to reconciliations, to withdrawals, to required minimum distributions and so on. Additionally, our members will have more ways to communicate with us. While we have some members who want to meet face-to-face to discuss their TRS benefits, others like to meet virtually, and even others want to simply retire with a click of a button. At the end of our modernization project, our members will have all those options to choose from. Members will also be able to update contact information and review and change beneficiary information online, among other improvements.

How long will this take? Modernization efforts kicked off nearly one year ago and will continue for the next three years. Improvements to a system that has been in place since 1943 take time and we want to ensure we are making long-term improvements with minimal disruption to our public education partners and members. Though the project is slated to take a total of four years, members will see incremental improvements as we go.

We are grateful for the service our members provide to our state and we continue to look for ways to better serve you.



OKLAHOMA
Teachers' Retirement System

PRSRSTD
U.S. POSTAGE
PAID
Oklahoma
City, OK
Permit No. 61

Post Office Box 53524
Oklahoma City OK 73152-3524

Have Questions? Need Help?
Here's how you can get in touch with us:

In person: 301 NW 63rd Street, Suite 500, Oklahoma City, OK 73116-7921
On the phone: 1-877-738-6365 or 405-521-2387
On the web: oklahoma.gov/TRS or facebook.com/okTRS

Printed by OMES Central Printing and issued by Oklahoma Teachers' Retirement System. 111,000 copies were printed at a cost of \$17,339.00. Copies have been deposited with the Publications Clearinghouse of the Oklahoma Department of Libraries.

Member Education Opportunities

TRS offers a variety of online retirement educational opportunities to help you plan for tomorrow, today!



REGISTER HERE!

<https://oklahoma.gov/trs/active-members/retirement-seminars.html>

Retirement Seminar Video Information

Retirement Timelines

Learn when to start the retirement process

Retirement Process

Instructions on how and when to start the process

Retirement Brochure

Get our Retiring with TRS brochure

Retirement Planning Seminar Presentation

See our slideshow

June 27, 2023	4:00 - 5:30PM
July 25, 2023	4:00 - 5:30PM
August 29, 2023	4:00 - 5:30PM
September 26, 2023	4:00 - 5:30PM
October 17, 2023	4:00 - 5:30PM